

MARKETING RETREATS FOR LAWYERS

CREATING A PATHWAY TO SUCCESS



LORI PULVERMACHER

ATTORNEY & PRACTICE ADVISOR

- Passionate about helping lawyers grow their businesses. Experience includes coaching, business management, marketing, sales, and client delivery.
- Prior to Atticus, Lori worked at notable organizations, including:
 - LIFT Consulting, Coach, trainer, and consultant in the areas of sales, leadership, communication, and organizational structure
 - Law As A Business (LAB), Director of Business Solutions, Director of Sales, and Lead Practice Solutions Advisor
 - ElderCounsel, LLC, sales, marketing, executive leadership, management
 - WealthCounsel, LLC, marketing, education, and events
- On the Board of Directors for these organizations:
 - Girls on the Run—South Central Wisconsin
 - Spring Green Area Chamber of Commerce
 - Kaul Community Park
- Girl mom, wife, small business owner, and outdoor enthusiast





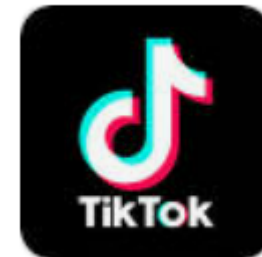
ATTICUS™
Great Practice. Great Life.

ABOUT US

We help lawyers grow great practices and cultivate great lives

STAY CONNECTED AND INFORMED

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 - <https://podcasts.apple.com/us/podcast/great-practice-great-life-by-atticus/id1636511715>
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MORE THAN JUST BEING GREAT AT THE LAW



THE GROWTH CORNERSTONES™

REVENUE, INCOME, CONTROL, FREEDOM AND IMPACT



Time
Management



Client Development
& Marketing



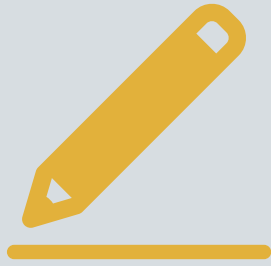
Building
a Great Team



Cash Flow
and Profitability

LEGAL SKILLS

PARTICIPATE



Pencil & paper
ready



Take notes



This session is interactive,
be prepared to join the
conversation

TODAY'S AGENDA



Why do I need a marketing retreat?

Before, during and after the retreat

Marketing goals and objectives

WHY AN ANNUAL MARKETING RETREAT

1

Analyze past marketing efforts

2

Set specific & measurable marketing goals

3

Coordinate & delegate responsibility

4

Establish dates for the upcoming year

5

Educate other partners or team members

6

Identify new opportunities for business

7

Focus on wins and acknowledge your team

BEFORE THE RETREAT



Identify attendees



Calendar a date, time and location



Select a facilitator:

You? Coach? Consultant?



Create Top 20 list and laser talk



Compile data



Print a calendar

BEFORE THE RETREAT

Total number of inquiry calls

Total number of new clients

Total number of marketing activities

Date, client name, and client source

Whether or not a client is qualified for the firm

If a consultation meeting was scheduled

Whether or not a potential client became an actual client

BEFORE THE RETREAT



DURING THE RETREAT



Discuss relationship-based marketing



Conduct a client selection refresher



Set marketing goals & objectives



Educate your team



Conduct a behavioral profile



Create a structure for accountability

A, B, C, D Client Matrix Form™



Name: _____ Date: _____

	Client Personality	Type of Case	Case Value	Collectible	Referral Source	Client Expectations
A						
B						
C						
D						

Notes: _____

MARKETING GOALS & OBJECTIVES



Cultivate Referrals



Improve Client
Service



Build Individual &
Firm Reputations

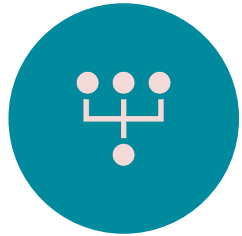


Host Events



Schedule Weekly
Marketing Contacts

MARKETING GOALS & OBJECTIVES



Join Your Clients'
Organizations



Schedule Sports &
Hobby-related
Events



Identify Cross-
selling
Opportunities



Hire Or Identify A
Marketing
Assistant

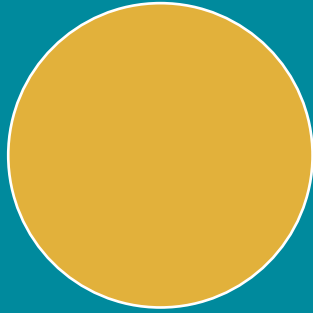


Energize Bar
Participation

HOW TO MARKET YOUR FIRM

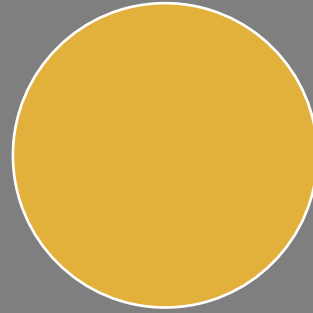
- ✓ Print Advertising
- ✓ Internet Advertising (PPC)
- ✓ Search Engine Optimization (SEO)
- ✓ Client Referrals
- ✓ Influencer Referrals
- ✓ Radio & Television Ads
- ✓ Signature Events
- ✓ Social Media Presence
- ✓ Seminars/Education
- ✓ Top of Mind Awareness
- ✓ Client Care Program
- ✓ Public Relations
- ✓ Word-of-Mouth

MARKETING GOALS & OBJECTIVES

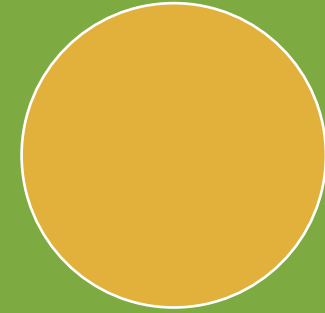


List out all client development activities and ask two questions:

- Did it deepen relationships with referral sources
- Can you identify a direct connection to new business



If you answer yes to both questions, how can you do more of this activity?

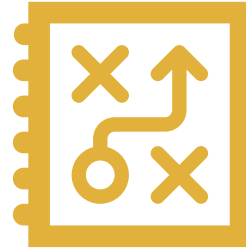


If your answer is no, how do you improve or eliminate the activity?

ATTICUS RAINMAKERS®



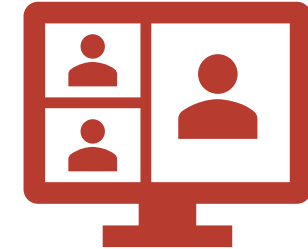
- Marketing is an essential activity for every business
- Without new clients, a law firm won't survive



- Learn strategies to generate consistent, quality referrals and new clients
- Implement tactics to dedicate focus and resources to marketing



- Develop marketing action plans
- Measure your results with the system this program teaches



- Led by a dedicated facilitator
- Virtual group setting
- Learn best practices
- Hear from your peers

Join **Atticus Rainmakers®**
to obtain more leads and referrals, while increasing your attention on
essential marketing activities.

You'll also gain an accountability partner
and support system!

AFTER THE RETREAT

Create a Structure for Accountability



NEXT STEPS

Identify
potential dates

Decide and
commit:
Schedule and
announce it

Determine how
to improve and
amplify

BENEFITS OF A LAW FIRM RETREAT INCLUDE

Learning and
training
through team
building

Establishing
new and more
profitable firm
direction

Building team
morale and
firm collegiality

Setting up new
client
development
processes

Better follow-
up and
accountability

If you are interested in learning more about law firm retreats and want to see if this is the right coaching opportunity for you, please complete the secure and confidential assessment:

<https://atticusadvantage.com/what-we-do/tailored-coaching/firm-retreats/>

UPCOMING WORKSHOPS AND PROGRAMS



THE PRACTICE GROWTH PROGRAM®

San Francisco
Orlando



RAISING THE BAR – GROWTH STRATEGIES FOR 2024

October 12, 2023
ZOOM



THE GRATEFUL LAWYER – HOLIDAY MARKETING FOR THE SAVVY ATTORNEY

November 9, 2023
ZOOM

Thank You!



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